

CHAPTER 5

MARKETING

Marketing in the Navy recruiting environment consists of identification and analysis processes to help us recruit the local population with available resources. The basic idea is to find out where our market is and develop a plan to reach it. This chapter will familiarize you with market segment categories, territory analysis, manning and goaling, station market analysis and review techniques (SMART) system, the prospect card system, and the marketing operations plan.

MARKET SEGMENTS

Our total market for recruiting is called military available. This term applies to all people who are within the recruitable age. The target market population is segmented into a primary and secondary target market. Further market divisions are based on mental groups, educational background, prior service, and minorities. In the following paragraphs, we take a look at the different market segments to familiarize you with the terminology of marketing.

PRIMARY TARGET MARKET

The primary target market includes males 17 to 21 years of age. They may be in or out of school. If they are in high school, they are considered will-grads. If they are attending a posthigh school institution, they are considered either 2-year or 4-year college or trade school market. If they are not in school, they are a part of the work force market. This is considered the primary market because, not only are they at the stage of life that career decisions are natural, they are also at the optimum training age.

SECONDARY TARGET MARKET

The secondary target market consists of the male 22- to 29-year-old age group, which can be high school

diploma graduates (HSDG), high school graduates (HSGs – high school equivalency), or nonhigh school graduates (NHSGs – dropouts). Although out of the school environment longer than the primary market, the secondary target market is still considered to be within the preferable age range.

MENTAL GROUPS AND EDUCATION

The Navy requires that the majority of accessions be upper mental group (those who attain a 50 percentile or above Armed Forces Qualifying Test [AFQT] score). Lower mental group enlistments must be HSDGs. Obviously, we are looking for the quality market. Population groups are divided into cells based on their mental group and education. Figure 5-1 shows the mental group and education cell designations.

“A” Cell

“A” cells are the upper mental group HSDGs. This is the market on which we must place the most emphasis. Today’s Navy demands personnel who are capable of filling challenging and demanding billets. This is also the most competitive market. Colleges, civilian industry, and other services will all vie for the “A” cell market interest.

“B” Cell

“B” cells are upper mental group nonhigh school graduates. The *Navy Recruiting Manual-Enlisted* (CRUITMAN-ENL), COMNAVCRUITCOMINST 1130.8, and the annual goaling notice places restrictions on the recruitment of these individuals.

| CELL MATRIX | HS DIPLOMA GRAD | NON-HS DIPLOMA GRAD |
|--------------------|-----------------|---------------------|
| Upper mental group | A | B |
| Lower mental group | C | D |

Figure 5-1.—Mental group and education cell matrix.

“C” Cell

“C” cells are lower mental group HSDGs. This market may be freely recruited.

“D” Cell

“D” cells are lower mental group NHSGs. We do not enlist this market.

PRIOR SERVICE

The prior service market is composed of individuals who have served on active duty in the Navy, Air Force, Army, Marine Corps, Coast Guard, or any of the Reserve components for a minimum of 180 consecutive days for paygrades E-4 and above or 365 consecutive days for paygrades E-1 through E-3. Although the prior service prospects have experience to offer, their enlistment is restricted based on current manning needs. The prior service market is divided into two categories — Navy veterans (NAVETs) and other service veterans (OSVETs). Marketing efforts for prior service personnel are contingent upon goals within your district.

MINORITY MARKETS

You also should consider your territory’s minority markets. You should identify the location of Black upper mental group (BUMG) and Hispanic upper mental group (HUMG) populations. The concept of minority upper mental group goaling is to ensure each population group is equally represented within the Navy.

TERRITORY ANALYSIS

Territory analysis consists of gathering together as much marketing information as you can about your specific territory and making some educated assumptions about your market. This information is used to develop prospecting plans, recommend manning requirements and facility locations, and evaluate goals, and becomes the basis for your input to the district’s marketing operations plan.

STANDARDIZED TERRITORY EVALUATION AND ANALYSIS FOR MANAGEMENT

The Standardized Territory Evaluation and Analysis for Management (STEAM) process of market analysis is used at all districts. The STEAM is a systematic analysis of the district. Zone and Navy recruiting station (NRS)

boundaries, educational institutions, and populations are identified by ZIP Codes. After a thorough analysis of STEAM data and subjective factors, sound decisions can be made on recruiter assignment and goaling.

Purpose

Recruiting success requires that you locate the recruitable population and assign goals based on the market. Market identification makes sure each NRS has a fair share of the market and goals are fairly apportioned based on that share of the market.

Updating Requirements and Reports

A complete STEAM is conducted at each Navy recruiting district (NRD) every 24 months. Area marketing staffs schedule and provide technical guidance for the STEAM process. The STEAM is updated annually upon receipt of the ZIP Code Market Analysis (ZCMA) report and quarterly upon receipt of the Department of Defense (DOD) all service accession data report. Initial STEAM information and updates will be issued in District, Zone, and Station Level Market Share reports.

ZCMA REPORT.— Commander, Navy Recruiting Command (CNRC) Code 22 annually distributes the ZCMA report to the Area and district level. Figure 5-2 is a sample ZCMA report. This report gives the following information by station and ZIP Code:

- Primary target market population (males 17 to 21 years old) total and black and Hispanic segments.

- Secondary target market population (males 22 to 29 years old).

- Current student Armed Services Vocational Aptitude Battery (ASVAB) results for males only, including the total number of males testing in the upper mental group and percentage, total testing in categories 3L and 4, total tested, and the same information broken out separately for black and Hispanic testers. These numbers only reflect institutional ASVAB results and do not reflect ASVABs given at mobile examining team (MET) sites or military entrance and processing stations (MEPS).

- NAVET military available, based on information provided on DD Forms 214N.

NAVY
RECRUITING COMMAND
1995 ZIP CODE MARKET ANALYSIS REPORT

DISTRICT: 999
ZONE: 99

| 1992 POPULATION MALES ONLY 17-21 | | | | | | | | | | 1995 STUDENT ASVAB RESULTS - MALES ONLY | | | | | | | | | |
|-------------------------------------|-------------|-------|------|-----|--------------|---------------------|--------------|-----------|----------|---|-------------|-----------|----------|------------|-------------|-----------|----------|------------|-----------------------------|
| STA ID | ZIP CODE | TOT | BLK | HSP | 22-29 POP | MALE TOT 1-3U | TOT% 1-3U | TOT 3L | TOT 4 | TOT TST | BLK 1-3U | BLK 3L | BLK 4 | BLK TST | HSP 1-3U | HSP 3L | HSP 4 | HSP TST | P8509 NVMA <1Y SEP |
| 999 | 00901 | 1035 | 80 | 57 | 1254 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 |
| 999 | 00911 | 0 | 0 | 2 | 7 | 1 | 108.0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00918 | 258 | 20 | 13 | 502 | 2 | 66.7 | 0 | 1 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00920 | 422 | 33 | 22 | 878 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00923 | 322 | 25 | 17 | 365 | 2 | 66.7 | 1 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 999 | 00927 | 448 | 32 | 22 | 635 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| 999 | 00931 | 72 | 3 | 2 | 187 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00952 | 1204 | 93 | 63 | 1863 | 1 | 100.0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 999 | 00954 | 708 | 62 | 42 | 927 | 7 | 31.0 | 4 | 9 | 22 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 1 | 0 |
| 999 | 00955 | 1867 | 145 | 37 | 2543 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00960 | 655 | 51 | 34 | 862 | 2 | 19.2 | 0 | 2 | 11 | 0 | 0 | 2 | 6 | 0 | 0 | 0 | 0 | 2 |
| 999 | 00962 | 299 | 23 | 16 | 496 | 18 | 65.2 | 4 | 2 | 26 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00964 | 57 | 4 | 3 | 105 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00965 | 775 | 60 | 40 | 1002 | 1 | 100.0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 |
| 999 | 00968 | 92 | 7 | 9 | 211 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00970 | 195 | 15 | 10 | 368 | 0 | 0.0 | 0 | 0 | 4 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00974 | 160 | 12 | 3 | 256 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00976 | 18 | 1 | 1 | 78 | 0 | 0.0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 999 | 00977 | 2330 | 180 | 122 | 3658 | 5 | 17.9 | 4 | 10 | 28 | 0 | 1 | 7 | 16 | 0 | 1 | 0 | 1 | 3 |
| 999 | 00980 | 567 | 43 | 29 | 711 | 7 | 33.3 | 11 | 2 | 21 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 1 | 0 |
| 999 | 00983 | 387 | 30 | 20 | 563 | 3 | 100.0 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00984 | 155 | 12 | 9 | 168 | 8 | 33.3 | 8 | 8 | 24 | 0 | 0 | 0 | 0 | 1 | 1 | 3 | 5 | 0 |
| 999 | 00986 | 55 | 4 | 3 | 88 | 1 | 100.0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00989 | 283 | 22 | 15 | 325 | 0 | 0.0 | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 999 | 00993 | 271 | 21 | 14 | 298 | 1 | 100.0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| 999 | 00994 | 406 | 31 | 21 | 631 | 1 | 16.7 | 2 | 2 | 6 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |
| | | 13044 | 1010 | 626 | 1896 | 60 | 38.0 | 36 | 36 | 158 | 1 | 2 | 9 | 28 | 1 | 4 | 4 | 9 | 20 |

Figure 5-2.—ZIP Code market analysis report.

DOD ALL SERVICE ACCESSION DATA REPORT.— The all service accession data report is issued quarterly by DOD from information received from MEPCOM. Figure 5-3 provides a sample of this report. This is one of your most useful gauges of success on recruiting. The report contains enlistment and accession data by ZIP Code, including quality and quantity information. This report lets you compare your success with the other services. It becomes an easy task to pinpoint ZIP Codes where additional emphasis is needed or where a recruiter is having exceptional success. Use the report to identify both your strengths and weaknesses.

DISTRICT/ZONE/STATION LEVEL MARKET SHARE REPORT.— The working marketing information comes in the form of the Station Level Market Share report. This same information is consolidated in reports by zone and district. We will cover the Station Level Market Share report shown in figure 5-4, column by column.

● **Identification Data** - The zone, station ID number, NRS name, ZIP Code, and city or town (optional) are listed in the first five columns.

● **Male SRs** - The number in this column reflects the number of male seniors attending a high school that is physically located in the corresponding ZIP Code. The

students may actually live in other ZIP Codes, but are reported in the school's ZIP Code.

● **Other Males 17 to 21** - This column lists males 17 to 21 years old who live in the indicated ZIP Code. High school seniors have already been subtracted from these numbers.

● **Males 22 to 29 Years Old** - The number in this column indicates all males 22 to 29 years old living within the indicated ZIP Code. These may or may not be high school graduates.

● **% of Market** - This number indicates the percent of the NRD market contained in the indicated ZIP Code. This number should be recalculated to find the percent of the station or zone market. Remember, it shows only the percent of the entire NRD market covered by the ZIP Code.

● **RAF** - This column gives the recruiter assignment factor (RAF) for each ZIP Code. An RAF of 1.0 is used as the basis for a market that should support one recruiter. An RAF is computed using male seniors, other males 17 to 21 years old, and males 22 to 29 years old. To get the total RAF for a recruiter, station, or zone, simply add the appropriate ZIP Code's RAFs. RAFs are covered in more detail later in this chapter when we discuss manning.

| FYTD ALL SERVICE ACCESSION/NEW CONTRACTS QTR ENDING_____ | | | | | | | | | | | | | | | | | | | | |
|--|----------------------------------|----|---|----|----------------------------------|---|---|---|---------------------------------------|---|---|---|-------------------------------------|---|---|---|-----------------------------------|----|---|----|
| B1193R MENTAL CATEGORY | NAVY ACCESSIONS N-CONTRACT | | | | ARMY ACCESSIONS N-CONTRACT | | | | AIR FORCE ACCESSIONS N-CONTRACT | | | | MARINES ACCESSIONS N-CONTRACT | | | | TOTAL ACCESSIONS N-CONTRACT | | | |
| | F | M | F | M | F | M | F | M | F | M | F | M | F | M | F | M | F | M | F | M |
| 310110 2N 03 OKALOOSA | | | | | | | | | | | | | | | | | | | | |
| 32501 PENSACOLA | | | | | | | | | | | | | | | | | | | | |
| BLACK | | | | | | | | | | | | | | | | | | | | |
| I-III A | 0 | 2 | 0 | 3 | 1 | 1 | 1 | 1 | 0 | 2 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 6 | 1 | 4 |
| II B-IV | 0 | 5 | 0 | 5 | 2 | 5 | 0 | 4 | 0 | 0 | 1 | 0 | 0 | 2 | 0 | 0 | 2 | 12 | 1 | 9 |
| HISPANIC | | | | | | | | | | | | | | | | | | | | |
| I-III A | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| NON-BLACK/HISPANIC | | | | | | | | | | | | | | | | | | | | |
| I-III A | 0 | 4 | 1 | 2 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 6 | 1 | 3 |
| TOTALS | | | | | | | | | | | | | | | | | | | | |
| I-III A | 0 | 6 | 1 | 6 | 1 | 1 | 1 | 2 | 0 | 3 | 0 | 0 | 0 | 2 | 0 | 0 | 1 | 12 | 2 | 8 |
| II B-IV | 0 | 5 | 0 | 5 | 2 | 5 | 0 | 4 | 0 | 0 | 1 | 0 | 0 | 2 | 0 | 0 | 2 | 12 | 1 | 9 |
| ZIP TOTAL | 0 | 11 | 1 | 11 | 3 | 6 | 1 | 6 | 0 | 3 | 1 | 0 | 0 | 4 | 0 | 0 | 3 | 24 | 3 | 17 |

Figure 5-3.—Department of Defense all service accession data report.

| ZONE | STA ID | NRS | ZIP CODE | NAME | MALE SRS | MALE 17-21 | MALE 22-29 | % OF MKT | RAF | NMA | BLACK MALES | HISP MALES | REC NO |
|-------|--------|-------|----------|------|----------|------------|------------|----------|------|-----|-------------|------------|--------|
| 1 | 245111 | IDEAL | 02500 | | 0 | 500 | 920 | .11 | .10 | 0 | 25 | 5 | 201 |
| 1 | 245111 | IDEAL | 02501 | | 240 | 560 | 892 | .40 | .38 | 1 | 50 | 2 | 202 |
| 1 | 245111 | IDEAL | 02502 | | 280 | 1200 | 2305 | .48 | .43 | 21 | 350 | 20 | 203 |
| 1 | 245111 | IDEAL | 02503 | | 586 | 2604 | 4820 | 1.00 | .88 | 28 | 500 | 20 | 204 |
| 1 | 245111 | IDEAL | 02504 | | 0 | 440 | 700 | .08 | .04 | 8 | 75 | 4 | 205 |
| 1 | 245111 | IDEAL | 02505 | | 141 | 800 | 1195 | .30 | .29 | 5 | 175 | 10 | 206 |
| 1 | 245111 | IDEAL | 02506 | | 112 | 894 | 1308 | .30 | .29 | 2 | 200 | 4 | 207 |
| 1 | 245111 | IDEAL | 02507 | | 0 | 510 | 870 | .10 | .09 | 0 | 125 | 2 | 208 |
| TOTAL | | | | | 1359 | 7508 | 13010 | 2.94 | 2.82 | 65 | 1500 | 67 | |

| ZONE | STA ID | NRS | ZIP CODE | NM | 2YR COLL | 4YR COLL | ASVAB | TOT UMG | % UMG | ALL SVC LAST FY | NAV NC LAST FY | % NC LAST FY | ALL SVC FYTD | NAVY NC FYTD | % NC FYTD | REC NO |
|-------|--------|-------|----------|----|----------|----------|-------|---------|-------|-----------------|----------------|--------------|--------------|--------------|-----------|--------|
| 1 | 245111 | IDEAL | 02500 | | 0 | 0 | 30 | 15 | .50 | 2 | 2 | 1.00 | 1 | 0 | .00 | 201 |
| 1 | 245111 | IDEAL | 02501 | | 0 | 0 | 80 | 32 | .40 | 20 | 10 | .50 | 7 | 3 | .43 | 202 |
| 1 | 245111 | IDEAL | 02502 | | 0 | 0 | 100 | 30 | .30 | 40 | 16 | .40 | 10 | 3 | .30 | 203 |
| 1 | 245111 | IDEAL | 02503 | | 0 | 1425 | 120 | 36 | .30 | 60 | 26 | .43 | 25 | 9 | .36 | 204 |
| 1 | 245111 | IDEAL | 02504 | | 0 | 0 | 4 | 2 | .50 | 9 | 3 | .33 | 3 | 1 | .33 | 205 |
| 1 | 245111 | IDEAL | 02505 | | 0 | 0 | 50 | 20 | .40 | 21 | 7 | .33 | 10 | 5 | .50 | 206 |
| 1 | 245111 | IDEAL | 02506 | | 0 | 0 | 60 | 18 | .30 | 30 | 6 | .20 | 12 | 3 | .25 | 207 |
| 1 | 245111 | IDEAL | 02507 | | 0 | 0 | 2 | 2 | 1.00 | 8 | 2 | .25 | 6 | 2 | .33 | 208 |
| TOTAL | | | | | 0 | 1425 | 446 | 155 | .35 | 190 | 72 | .38 | 74 | 26 | .35 | |

Figure 5-4.—Station level market share report.

● **NMA** - This column gives the number of NAVET military available that are documented to be living in the indicated ZIP Code. These numbers are determined by input from the home of records indicated on DD Forms 214N when individuals are released from active duty or discharged.

● **Black Males** - This number indicates the black 17- to 21-year-old population for each ZIP Code.

● **Hispanic Males** - This number indicates the Hispanic 17- to 21-year-old population for each ZIP Code.

● **Rec. No.** - This abbreviation stands for record number and is used by the statistician or computer operator to pull up an individual line from the report for changes.

● **Male 2YR COLL** - This column lists males who are attending a 2-year educational program within the applicable ZIP Code. This would include 2-year colleges and posthigh school vocational schools.

● **4YR COLL** - The number in this column represents the number of males enrolled in a 4-year college located in the applicable ZIP Code. This number includes all students, regardless of their actual residence or home of record.

● **ASVAB Information** - This section gives the total number of students tested with the institutional version of the ASVAB for each ZIP Code, the total scoring in the upper mental group categories, and the percent of those tested who scored in the upper mental group categories.

NOTE: When using the ASVAB results to determine market quality, make sure enough of the

population was tested to give an accurate picture of the entire market. A good rule of thumb is at least 20 percent of the male high school seniors (MHSS) must test in order to use the ASVAB as a quality indicator. If less than 20 percent tested, you can use all service accession data or past production information.

- **Accession Data** - These columns give the total from each ZIP Code accessed by all services for the last fiscal year (FY), the number of Navy contracts for the last FY, the percent of all service accessions that went Navy for the last FY, and the same information for the current FY to date.

Verification of Market Reports

It is your responsibility to verify the information given on the market share reports. You should use both internal and external sources to complete your verification.

EXTERNAL SOURCES OF MARKETING INFORMATION.– The supply of external sources of marketing information seems to be endless. Some of the most used sources include the following:

- **Census data** - A national census is conducted at 10-year intervals. This information becomes less accurate as time passes. Local and state agencies may conduct more frequent censuses that will be more up to date.

- **Universities** - Most universities have a marketing project ongoing in their business curriculum. Many publish comprehensive demographic reports that may include information on population, economy, employment, and other relevant subjects.

- **City planning commissions** - They usually keep population figures and projections.

- **Chamber of Commerce** - The Chamber of Commerce can not only give census-type data but also can give you a great deal of information about competition such as industry and educational facilities.

- **Schools** - It is imperative that up-to-date information regarding current enrollment be obtained directly from your assigned schools. For some reason, these numbers may differ from the ones obtained from state boards of education.

- **Tax offices** - Tax offices may have some relevant information, but keep in mind that some of your population may not be listed on local tax rolls.

- **Transportation offices** - Public transportation systems often keep demographic information on file to plan for future routes and services.

- You would also want to obtain figures concerning any institution or population group that may be included in census data that you know should be deleted from your recruitable market. Examples would be military installations, prison systems, large institutions or communities whose religion prohibits military service, and large concentrations of otherwise ineligible population. Keep in mind that the numbers you collect have in all probability already been subtracted from your marketing data. Occasionally, circumstances change or you may find something that was missed in a previous analysis.

INTERNAL SOURCES OF MARKETING INFORMATION.– You will be able to verify some of the data on the marketing reports with information available within your station, zone, or NRD. Rough check Navy new contracts with past production records. Some statistics may differ slightly due to out-of-area contracts. You should be able to cross-check ASVAB information with listings provided to your stations. A complete verification of all ASVABs is not necessary, but if you get the feeling the upper mental group percentages are off, cross-check a few schools.

Steam Conference

When the time comes for your district to conduct its biannual STEAM, the enlisted programs officer (EPO) will task you with providing up-to-date demographic information. Recruiters in charge (RINC)s should gather information about their assigned territory and the zone supervisor (ZS) will consolidate the information for the stations within the zone. Any discrepancies found in previous marketing reports should be fully documented with written evidence to be presented at the STEAM conference. Keep in mind that small deviations of population will not significantly change your RAF or gosling share. If you want to challenge the numbers, (1) be sure the difference is significant and (2) have documentation to support your claims. The following data is required to conduct a STEAM:

- ZIP Code list by station and zone

- Total number of production recruiters on board the NRD and their station assignment
- Total MHSSs identified by ZIP Code location of the school
- Male 2-year posthigh school by ZIP Code location of the school
- All other males 17 to 21 years old by ZIP Code (MHSSs must be subtracted from this total in order not to double-count)
- Males 22 to 29 years old by ZIP Code
- NAVET military available by ZIP Code
- Black males 17 to 21 years old by ZIP Code
- 4-year college population by ZIP Code location of campus
- Total number of students ASVAB tested (student testing program) by ZIP Code
- Total number of students that tested in upper mental group categories by ZIP Code
- The number of upper mental group new contracts written by the Navy and by all services for the previous year by ZIP Code
- The number of upper mental group contracts written by the Navy and all services for the current year by ZIP Code
- Any documentation that may alter previously reported data

CONFERENCE FORMAT.– Each educational institution is verified by ZIP Code and enrollment figures. Population, testing, and accession statistics are also verified. Any discrepancies between statistics are arbitrated. Ultimately, an NRD map is developed, showing all ZIP Code, station, and zone boundaries. Following a thorough analysis and assessment of all data collected, new NRD totals are computed. New totals are used to recalculate market percentages and RAFs for all ZIP Codes. You will receive this new information in the Station and Zone Level Market Share reports.

AREA STEAM TEAM.– Each Area commander directs the formation of an Area STEAM team, with the

Area marketing support officer acting as the Area STEAM coordinator. The STEAM team will help NRDs conduct their STEAM.

NRD EDUCATION SPECIALIST.– The NRD education specialist (EDSPEC) is tasked with becoming the NRD STEAM expert. The EDSPEC will provide educational population figures obtained from the state board of education to be bounced against those collected from the field.

OTHER DEMOGRAPHIC CONSIDERATIONS

Demographics is a term used to cover statistics related to a human population including size, density, distribution, economy, employment, and a myriad of other vital statistics. When making a marketing analysis, we have to consider all the factors that may affect the recruiting environment. As we discussed earlier, STEAM will provide the marketing data for population size, distribution, testing results, and accession data. Your territory analysis should also include information about the area's economy, employment, and attitudes.

Economics

You should have a good idea of the economic situation of your territory. What is the per capita income? How does the Navy pay compare to average local wages for young people? Is the local economy stagnant or is it steadily growing? Answering these questions will help you know your territory.

Employment

Local employment is always a competitive consideration. Find out what the employment opportunities are and what the unemployment percentage is for your territory. This unemployment percentage should be compared to the rest of the zone and NRD. When unemployment is high, there is less competition for the new work force market. Conversely, when unemployment is very low, jobs are plentiful and competition is high.

Propensity to Enlist

Propensity to enlist is a term that has been alternately raised and dismissed as a factor in recruiting success. Propensity to enlist basically refers to how inclined people of an area are to enlist in the military service. Local attitudes, customs, and values may affect recruiting efforts. There are parts of the country that are

considered to be more mobile, where pulling up roots and moving on is a way of life. Other areas are more inclined to “nest” or stay in the same community for generations.

Usually, propensity to enlist is the result of one of the other demographic factors at work, but there are times when an area may seem to be either very pro-military or just the opposite for no obvious reason. A little investigation may lead you to find that the trend is a result of past publicity or recruiting practices that left the community with either some very positive or negative impressions. Be very careful when using propensity to enlist as a subjective factor in gosling or manning considerations. A professional prospecting and public awareness plan can boost the propensity to enlist dramatically.

USING YOUR TERRITORY ANALYSIS INFORMATION

Now that you have gathered all this marketing information for your territory, it is time to use the analysis for decisions and recommendations on territory distribution, manning, and gosling.

Territory Distribution

Zone, station, and recruiter boundaries should be evaluated to determine if they are equitable, manageable, and logically drawn.

RECRUITER BOUNDARIES.– The RINC should use the STEAM data to determine the exact market share and RAF for each recruiter. Then the territory should be evaluated for quality and market segment distribution. The RINC is responsible for making sure each recruiter has a fair share of the military available within the NRS boundaries to ensure the NRS territory is properly covered. When dividing territory among recruiters, a pie slice distribution will usually result in the most equitable market distribution.

Pie slice distribution involves giving each recruiter a little of each type of territory available, such as a few ZIP Codes from rural, suburban, and metropolitan areas. Figure 5-5 shows a pie slice territory distribution. Obviously, this will not always work. Some stations are comprised of only one type of territory. Others may have logistic problems in using the pie slice method. Your goal should be to accomplish fair share distribution while maintaining logical divisions.

STATION BOUNDARIES.– When evaluating station boundaries, you should determine if they are geographically manageable with the available assets. If you find areas that would be more easily prospected from another station, recommend changing the boundaries. The commanding officer (CO) must approve all boundary changes. You should also assess the quality and quantity of the available market to ensure each station has a reasonable opportunity to meet its objectives within the district’s quality restraints. If you find a station with a very low percentage of upper mental group ASVAB scores, look for a neighboring ZIP Code that is producing the quality they are lacking. Then, recommend a boundary change. ZSs are responsible for making sure each NRS receives a fair share of the military available within the zone boundaries.

ZONE BOUNDARIES.– The chief recruiter (CR) and EPO will evaluate zone boundaries. You, however, can make observations and forward relevant information up your chain of command. Zone boundary considerations should include the number of stations and recruiters supervised, geographical anomalies, manageability, and an attempt to see that each zone has a fair share of available markets.

Manning

Ultimate duty assignments are made by the CO. The CR and the EPO make recommendations on manning and assignments. As a member of the Career Recruiting Force (CRF) community, you also are responsible for making manning recommendations. In making these recommendations, you should consider recruiter assignment factors, your other territory analysis data, and the training and experience levels of those assigned.

RECRUITER ASSIGNMENT FACTOR.– The RAF found on the Station Level Market Share report considers numbers only. The STEAM program automatically figures RAF for each ZIP Code, using the following formulas:

1. Compute the NRD weighted market:

$$\begin{aligned} &\text{NRD MHSS X .40 + NRD 17-21} \\ &\quad \text{X .40 + NRD 22-29 X .20 =} \\ &\text{NRD WEIGHTED MARKET} \end{aligned}$$

2. Compute the ZIP Code weighted market:

$$\begin{aligned} &\text{ZIP MHSS X .40 + ZIP 17-21 X .40 + ZIP 22-29} \\ &\quad \text{X .20 = ZIP WEIGHTED MARKET} \end{aligned}$$

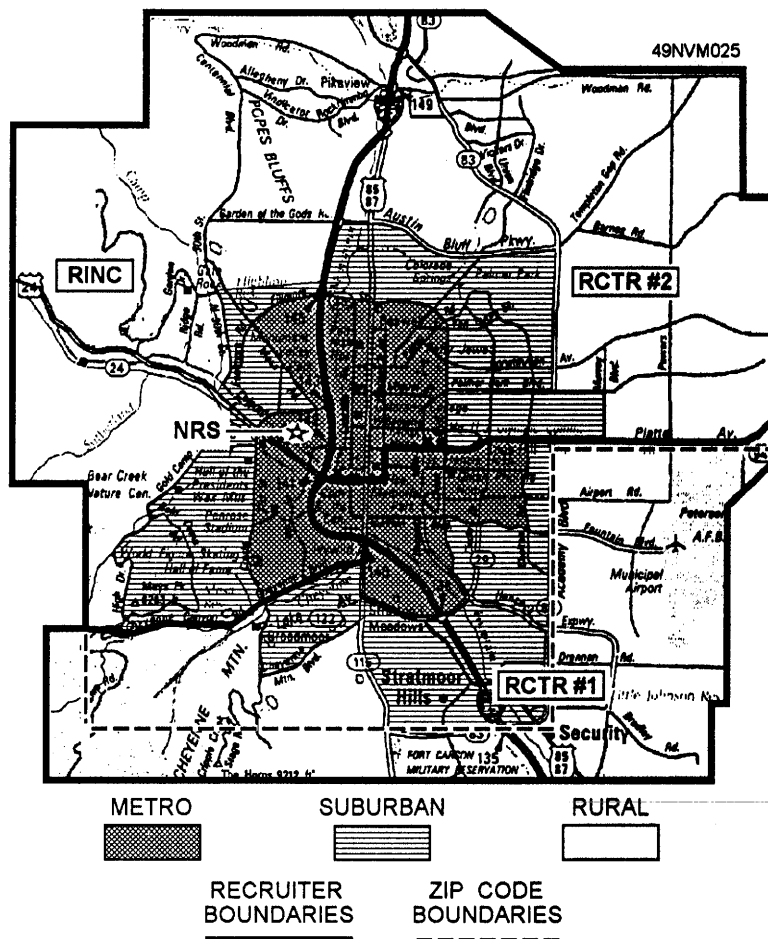


Figure 5-5.—Pie slice territory distribution.

3. Compute the RAF:

$$\frac{\text{ZIP WEIGHTED MARKET/NRD WEIGHTED MARKET} \times \text{TOTAL NRD PRODUCTION}}{\text{RECRUITERS}} = \text{RAF}$$

The RAF is the most important factor considered for recruiter manning assignments; however, it must be used in conjunction with other factors that affect the recruiting environment.

TERRITORY ANALYSIS FACTORS.— Other manning considerations include the following:

- Quality of past production
- Competition from industry and other services
- Resources available (travel funds, manpower, support personnel, time, vehicles, location of NRS, and LEADS)

- Educational cost and ability to obtain a marketable skill
- Prior service markets
- Priority programs, difficulty to recruit, and goal restrictions
- Attitudes within the local area toward the military
- Weather conditions
- Any other factors that are peculiar to individual recruiting stations

TRAINING AND EXPERIENCE LEVELS.—

When actual assignments are considered, you should take into account the training and experience level in your recruiting stations. If you have a new RINC with a relatively inexperienced team, you may not want to pile additional training requirements on the station until the RINC is ready to take on more

responsibility. On the other hand, you may have a station of seasoned players who could use a fresh and eager recruiter to liven up the office. Consider actual recruiter qualification standards (RQS) levels of your personnel, leadership experience, skill levels, and attitudes when recommending assignments.

Goaling

The EPO, with input from the CR, distributes production goals to the ZSs. The ZSs then calculate the station goals and submit them back to the EPO via the CR. The EPO reviews the station goals and, if approved, includes them in the district's monthly goaling notice, which is signed out by the CO. Whether calculating monthly or quarterly goals, the fair share goal method is used. Fair share goaling uses market share and recruiter share, systematically weighted, to determine zone and station goal shares. The basic formula is as follows:

$$\text{Zone goal share} = \frac{\text{MKT WT} \times \text{MKT Share}}{\text{MKT WT} \times \text{RCTR Share} + 1}$$

MARKET SHARE.– Zone market share is taken straight from the Zone Level Market Share report. The total market share percentage is used for each zone. Station market share must be computed as a percentage of the zone market share before using in the goal share formula. Remember, the Station Level Market Share report gives the market percentage of the NRD market for each ZIP Code and a total for the NRS. To determine the station's percentage of zone market, simply divide the NRS total market share percentage by the zone total market share percentage.

RECRUITER SHARE.– Zone recruiter share is computed by dividing the number of recruiters in the zone by the total number of production recruiters in the district. Station recruiter share is derived by dividing the number of recruiters in the station by the number of recruiters in the zone. All recruiters assigned should be counted, even “off production” RINCs.

WEIGHTS.– Weights are applied to compensate for inequities in manning, experience, and territory factors. Basically, you are deciding which should have more impact on the goal, the number of recruiters assigned or the market potential. If all things were fairly equal, a 50/50 weight distribution would suffice. When determining weights keep in mind that, although being undermanned may be considered a negative aspect, each recruiter does have a bigger slice of the pie, so to speak, from which to recruit. Stations that are overmanned may

have smaller individual territories, but the overall market coverage is greater. The weighting assignment is a subjective decision that is meant to equalize the goal assignments. At the station level, small shifts in weight factors will not overly affect goals.

USING THE FAIR SHARE GOAL METHOD.– Let's use the fair share goal method to calculate the goals for stations within a theoretical zone. You are the ZS for Zone Alpha which has a total of 25 recruiters. Your zone has 30 percent of the district's market. You have five assigned stations with the following district market shares and numbers of recruiter:

- NRS 001, 5 percent of district market share, five recruiters
- NRS 002, 10 percent of district market share, eight recruiters
- NRS 003, 4 percent of district market share, three recruiters
- NRS 004, 6 percent of district market share, five recruiters
- NRS 005, 5 percent of district market share, four recruiters

The CR has called your zone goal to you as follows:

| | |
|--------------------|----|
| New contract goal: | 40 |
| NPSWF: | 20 |
| “A” Cell: | 30 |
| UMGB: | 8 |
| UMGH: | 2 |
| NF: | 3 |

Compute New Contract Goals.– The first thing you should do is compute the station new contract goals.

1. Determine each station's percentage of zone market by dividing their district market share percentage by the zone's share of the district market percentage.

- NRS 001: .05 divided by .30 = .1666
- NRS 002: .10 divided by .30 = .3333
- NRS 003: .04 divided by .30 = .1333
- NRS 004: .06 divided by .30 = .2000

$$\text{NRS 005: } .05 \text{ divided by } .30 = .1666$$

2. Determine each station's recruiter share by dividing the number of recruiters in the station by the total number of recruiters in the zone:

$$\text{NRS 001: } 5 \text{ divided by } 25 = .20$$

$$\text{NRS 002: } 8 \text{ divided by } 25 = .32$$

$$\text{NRS 003: } 3 \text{ divided by } 25 = .12$$

$$\text{NRS 004: } 5 \text{ divided by } 25 = .20$$

$$\text{NRS 005: } 4 \text{ divided by } 25 = .16$$

3. Determine weights for market share and recruiter share. For this exercise we will consider manning conditions are ideal based on RAF and subjective assignment factors. Training levels are fairly equal and there are no other significant considerations. Therefore, we will make the market share weight .50. Recruiter share is 1 - the market share, which would also be .50.

4. Now, let's use the formula to compute each station's goal share.

$$\text{NRS 001: } .1666 \times .50 + .20 \times .50 = .0833 + .10 = .1833$$

$$\text{NRS 002: } .3333 \times .50 + .32 \times .50 = .1666 + .16 = .3266$$

$$\text{NRS 003: } .1333 \times .50 + .12 \times .50 = .0666 + .06 = .1266$$

$$\text{NRS 004: } .2000 \times .50 + .20 \times .50 = .1000 + .10 = .2000$$

$$\text{NRS 005: } .1666 \times .50 + .16 \times .50 = .0833 + .08 = .1633$$

If these numbers are easier to understand in percentages, just move the decimal over two places. For example, NRS 001's goal share of .1833 becomes 18.33 percent.

5. Now multiply the goal share times the zone new contract goal of 40 to get the individual station new contract goals.

$$\text{NRS 001: } .1833 \times 40 = 7.33$$

$$\text{NRS 002: } .3266 \times 40 = 13.04$$

$$\text{NRS 003: } .1266 \times 40 = 5.06$$

$$\text{NRS 004: } .2000 \times 40 = 8.00$$

$$\text{NRS 005: } .1633 \times 40 = 6.53$$

6. Round goals off, ensuring the total equals 40. Station goals would be 7, 13, 5, 8, and 7 respectively.

7. Compare required production per recruiter (PPR) for each station by dividing the goal by the number of recruiters assigned. There should not be a significant difference between stations. If you find the difference to be 1.0 or greater, you probably have a manning imbalance. Weights should be adjusted to compensate.

Goaling Worksheet.– You may find the goaling worksheet, provided in figure 5-6, helpful when computing goals for your stations.

Assign Work Force, "A" Cell, Minority and Program Goals.– Using data from your STEAM reports and other territory analysis information, assign goals for work force, "A" cell, minority upper mental groups, and programs. Make sure you distribute these goals fairly over the course of the FY, not just 1 month at a time. For example, let's say that the Hispanic population is broken down as follows:

NRS 001 - 20 percent

NRS 002 - 50 percent

NRS 003 - 5 percent

NRS 004 - 15 percent

NRS 005 - 10 percent

This month you are goaled with two Hispanic upper mental group (HUMG) contracts. You could goal NRS 001 and NRS 002 each with one HUMG for the month. However, if you continued this over the course of the year, NRS 001 would end up with 50 percent of your annual Hispanic goal instead of a fair 20 percent. NRS 002 would have a fair 50 percent of the zone's Hispanic goal, but the other stations would be undergoaled over the course of the year. To make sure your goaling practices are fair, you should alternate the minority goaling to ensure year-end percentages are equitable.

| MARKET | | | | | |
|-------------------------------------|----------|----------|----------|----------|---------------|
| A. WEIGHT _____ | NRS ____ | NRS ____ | NRS ____ | NRS ____ | ZONE TOTAL |
| B. MARKET PERCENTAGE | | | | | |
| A X B = MARKET SHARE | | | | | N/A |
| RECRUITER | | | | | |
| A. WEIGHT _____ | NRS ____ | NRS ____ | NRS ____ | NRS ____ | ZONE TOTAL |
| B. # OF REC ASSIGNED | | | | | |
| C. PERCENT OF ZONE RECRUITERS | | | | | 100 |
| A X C = RECRUITER SHARE | | | | | N/A |
| GOAL | | | | | |
| | NRS ____ | NRS ____ | NRS ____ | NRS ____ | ZONE TOTAL |
| A. MARKET SHARE | | | | | N/A |
| B. RECRUITER SHARE | | | | | N/A |
| C. A + B = GOAL SHARE | | | | | N/A |
| C X ZONE GOAL = ACTUAL GOAL | | | | | |
| PPR COMPARISON | | | | | |
| | NRS ____ | NRS ____ | NRS ____ | NRS ____ | ZONE |
| # OF REC | | | | | |
| PPR REQUIRED | | | | | |

Figure 5-6.—Goaling worksheet.

Not only would this be fair, it would also make the best use of the potential in each of the station's markets.

COMPETITION GOALS.– The goals in the NRD gosling notice are the only goals that can actually be set for a station or zone. Inflated goals to work for competition or make up for coming attrition are not allowed. If you are interested in competing with other stations and zones (and as a CRF member, you should be), then how do you instill that desire to others on your team? First of all, working toward a competitive goal must be a consensus of all your personnel. They should all buy in and find the goal acceptable. It may not be unanimous that everyone truly desires to compete, but there should be no objectors. It cannot be just majority rules, where the minority is ignored. So, your first job is to sell the idea to the team. Do your homework; know what it will take to be competitive. Refer to the section on goal setting to make sure you have a valid and complete goal. Above all, have a plan to achieve the goal. Fostering the competitive spirit in others requires a great deal of confidence in yourself and your team. Most importantly, they should be doing the extra because they want to, not because it has been imposed upon them. Your job is once again that of a fire starter. Sell a few key people and they will help create enthusiasm in the other members of the team. Once that forward momentum is achieved, you are on your way to success.

STATION MARKET ANALYSIS AND REVIEW TECHNIQUES

The SMART system is designed to identify where the quality market can be found and where target market center locations are. It shows where recruiting resources and emphasis should be placed to achieve the best results. With this data, we can compare and analyze strengths and weaknesses so new strategies and training can be applied. The data produced by the STEAM process provides the majority of the information needed for the SMART system. The SMART system consists of the NRS territorial map, the new contract/qualified not enlisted (QNE) overlay, and the recap sheets which are all maintained on the SMART board, the recruiter travel itineraries, school folders, and the Delayed Entry Program (DEP) status board. The *Science and Art of Navy Recruiting Manual*, COMNAVCRUITCOMINST 1133.6, gives guidance on developing each component of the SMART system. In the following paragraphs, we will give you pointers about how to evaluate a station's SMART system.

NRS TERRITORIAL MAP

The NRS territorial map should be large enough to post the entire territory in detail. An NRS with both rural and metropolitan areas may require two maps to adequately represent the area. The territorial map gives a graphic view of the NRS area of responsibility. Individual recruiter territories, ZIP Code boundaries, and educational institutions are all marked. This view of the NRS territory helps ensure market distribution is not only fair by the numbers but also logistically sound. The territorial map remains in place on the SMART board (fig. 5-7) until changes occur, so you should make sure the map is neat, accurate, and easily read.

NEW CONTRACT/QNE OVERLAY

Analysis of the territorial map should be done in conjunction with the new contract/QNE overlay. The clear acetate overlay shows the location of all new contracts and QNEs by posting yellow and red dots, respectively, over the location of their domicile. Minorities are further identified with appropriate letters (B for black, H for Hispanic, and O for other) written on the dots. The overlay is maintained on an FY basis and retained for 1 year. This enables you to compare last year's contract information with this year's information graphically on the map. You should make the comparison to identify locations where additional emphasis may result in more contracts and locations where new methods are producing better results. This information should already be identified on the STEAM data, but seeing the results pictorially will sometimes give a better idea of what is happening and may trigger ideas for solutions.

Recap Sheet

The station, zone, and district recap sheets are computer-generated reports that are distributed monthly. They are the permanent record of FY gosling and attainment. Only the most current monthly station recap sheet should be posted on the SMART board because the report is cumulative. It is strongly suggested that you retain the end of the FY report as a permanent goal and production record to be used for analysis and comparison over the next 2 years. Figure 5-8 is a sample station recap sheet. The zone recap sheet is the same. Attainments are listed as net numbers. Attrites are subtracted from recap sheets with the exception of Naval Reserve Officers Training Corps (NROTC) accessions

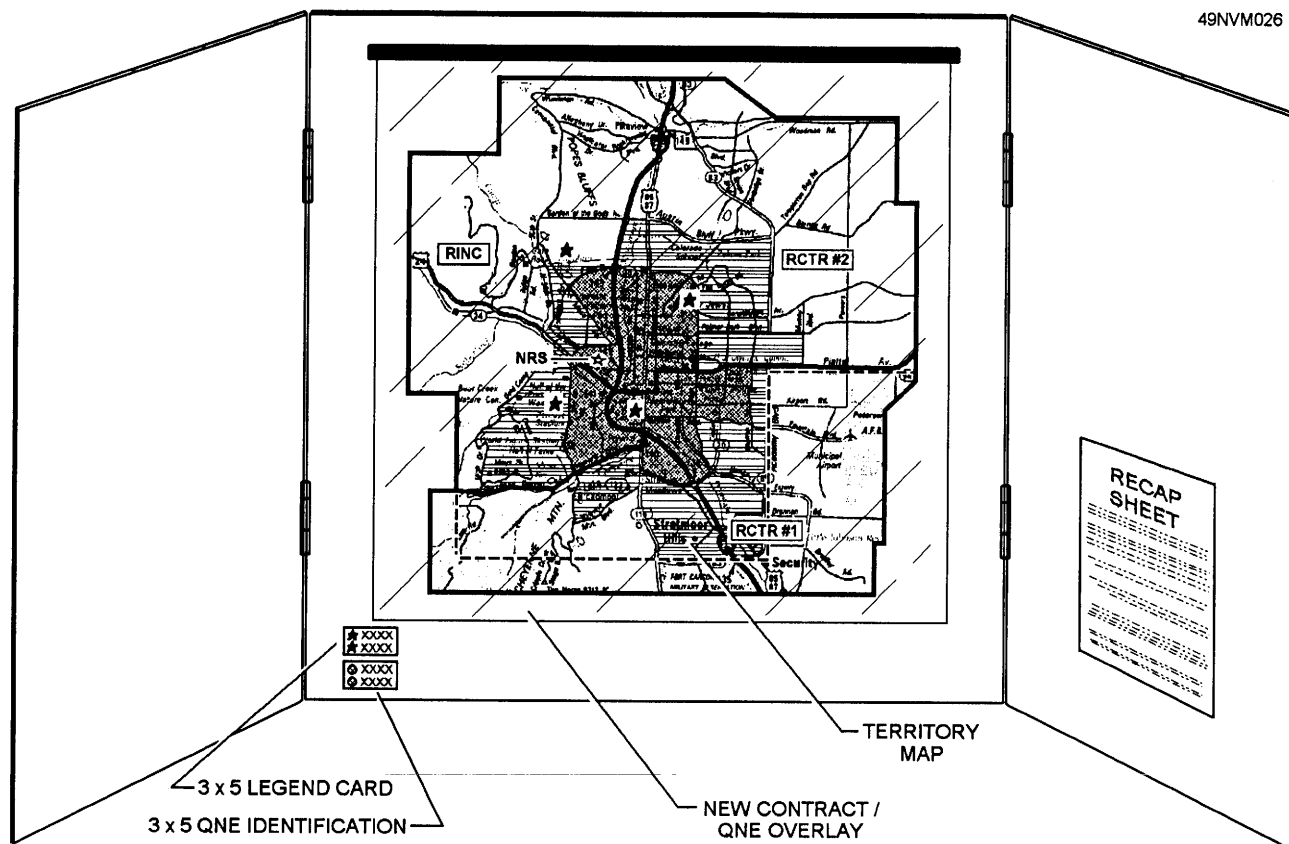


Figure 5-7.—NRS SMART board.

who attrite from DEP. Stations and zones will not lose credit for the NROTC accession. NRDs, however, must replace the attrite. Any of the categories, with the exception of accessions (at the NRD and Area levels), may be recouped for the quarter or FY if the deficit is made up. Figure 5-9 shows the same report on the district level. Notice the district recap sheet includes DEP slope objective (DSO) instead of work force and has an additional column for accession goal and attained.

Station and Zone Competition

New contract attainment is competition between stations and used for all NRD zones. Local award and incentive programs may also be initiated. Stations compete based on their respective RAFs. Station size categories are as follows:

- Small station. RAF of 2.5 or less
- Medium station. RAF of greater than 2.5 and equal to or less than 4.5
- Large station. RAF of greater than 4.5

NRDs may subdivide stations within the district to reward more than one winner in each size category. Zones are evaluated and compete solely on new contract attainment regardless of size.

District and Area Competition

District competition within the Area is based on new contract attainment with the addition of DEP slope objective (DSO), admiral's emphasis, and shipping attainment. Area competition is identical to the district's competition.

DSO.— DSO is the number of contracts that need to be DEPped this month to ship within the next 3 months in order to reach the ideal DEP slope of 90 percent, 80 percent, and 70 percent for the first, second, and third out-month, respectively.

ADMIRAL'S EMPHASIS.— The Admiral's emphasis column is used by COMNAVCRUITCOM to emphasize immediate critical elements. This category is issued as required.

DATE:
1/2/95

RECAP SHEET FOR THE MONTH OF JANUARY 95
NRS: ANYWHERE
VER 1.0

| | | WORK | | BLK | | | | STATUS | |
|-------------------------------------|-------|-------|-------|-------|------|------|-----|--------|-----------|
| | | NCO | FORCE | UMG | UMG | HISP | NF | FEM. | |
| OCT | GOAL: | 5 | 3 | 3 | 1 | 0 | 1 | 1 | MADE GOAL |
| | ATTN: | 5 | 3 | 4 | 1 | 1 | 1 | 1 | |
| -----OCT ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| NOV | GOAL: | 4 | 3 | 3 | 0 | 1 | 0 | 0 | MISS HISP |
| | ATTN: | 5 | 3 | 4 | 0 | 0 | 0 | 1 | |
| -----NOV ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| DEC | GOAL: | 4 | 3 | 3 | 0 | 0 | 1 | 1 | MISS NCO |
| | ATTN: | 3 | 3 | 2 | 1 | 1 | 1 | 1 | |
| -----DEC ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| 1ST | GOAL: | 13 | 9 | 9 | 1 | 1 | 2 | 2 | MADE GOAL |
| QTR | ATTN: | 13 | 9 | 10 | 2 | 2 | 2 | 3 | |
| ----- | | | | | | | | | |
| JAN | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----JAN ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| FEB | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----FEB ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| MAR | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----MAR ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| 2ND | GOAL: | | | | | | | | |
| QTR | ATTN: | | | | | | | | |
| ----- | | | | | | | | | |
| APR | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----APR ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| MAY | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----MAY ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| JUN | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----JUN ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| 3RD | GOAL: | | | | | | | | |
| QTR | ATTN: | | | | | | | | |
| ----- | | | | | | | | | |
| JUL | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----JUL ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| AUG | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----AUG ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| SEP | GOAL: | | | | | | | | |
| | ATTN: | | | | | | | | |
| -----SEP ATTAINMENTS ENTERED YES=1> | | | | | | | | | |
| 4TH | GOAL: | | | | | | | | |
| QTR | ATTN: | | | | | | | | |
| ----- | | | | | | | | | |
| ***** | | | | | | | | | |
| FYTD | GOAL: | 13 | 9 | 9 | 1 | 1 | 2 | 2 | MADE GOAL |
| | ATTN: | 13 | 9 | 10 | 2 | 2 | 2 | 3 | |
| ***** | | | | | | | | | |
| | | NCO | WF | UMG | BUMG | HISP | NF | FEM | |
| DELTA: | | 0 | 0 | 1 | 1 | 1 | 0 | 1 | |
| % ATTAINED: | | 100.0 | 100 | 111.1 | 200 | 200 | 100 | 150 | |

FEMALE NCA = 23.1%

49NVM045

Figure 5-8.-Station recap sheet.

DATE:
4/28/95

RECAP SHEET FOR THE MONTH OF
NRD

VER 1.0

| | | NCO | DSO | UMG | BLK UMG | HISP | NF | FEM. | ACCN | STATUS |
|-------------|-------|-------|-------|------|------------|------|-----|------|------|-----------|
| OCT | GOAL: | 140 | 77 | 87 | 11 | 11 | 4 | 11 | 1 | |
| | ATTN: | 140 | 81 | 58 | 11 | 4 | 4 | 11 | 1 | MISS UMG |
| NOV | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| DEC | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| 1ST | GOAL: | 140 | 77 | 87 | 11 | 11 | 4 | 11 | | |
| QTR | ATTN: | 140 | 81 | 58 | 11 | 4 | 4 | 11 | | MISS ACCN |
| JAN | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| FEB | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| MAR | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| 2ND | GOAL: | | | | | | | | | |
| QTR | ATTN: | | | | | | | | | |
| APR | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| MAY | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| JUN | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| 3RD | GOAL: | | | | | | | | | |
| QTR | ATTN: | | | | | | | | | |
| JUL | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| AUG | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| SEP | GOAL: | | | | | | | | | |
| | ATTN: | | | | | | | | | |
| 4TH | GOAL: | | | | | | | | | |
| QTR | ATTN: | | | | | | | | | |
| FYTD | GOAL: | 140 | 77 | 87 | 11 | 11 | 4 | 11 | | |
| | ATTN: | 140 | 81 | 58 | 11 | 4 | 4 | 11 | | MISS ACCN |
| | | NCO | DSO | UMG | BUMG | HISP | NF | FEM | | |
| DELTA: | | 0 | 4 | -29 | 0 | -7 | 0 | 0 | | |
| % ATTAINED: | | 100.0 | 105.2 | 66.7 | 100 | 36.4 | 100 | 100 | | |

FEMALE NCA PERCENTAGE = 7.86%

49NVM046

Figure 5-9.-District recap sheet.

SHIPPING ATTAINMENT.– The terms *shippers*, *accessions*, and *One Navy goal* all identify our real purpose in recruiting. This is the number of enlistees we actually send to basic training. This critical goal originates at Bureau of Naval Personnel (BUPERS) as mandated by Congress. Shortfalls in shipping attainment cannot be recovered in subsequent periods.

ITINERARIES

Itineraries are developed to increase awareness of Navy opportunities and produce enlistments. Itinerary Data Cards, NAVCRUIT Form 1133/49, are developed by each recruiter, reviewed by the RINC, and approved by the ZS. They should be evaluated after every run of the itinerary during the RINC's daily production review (DPR) and periodically by the ZS.

Evaluating the New Itinerary

The RINC should actually run the new itinerary with the recruiter to review stops and make recommendations. The ZS need not run the itinerary before approving it, but should make inquiries to evaluate its effectiveness. The ZS should conduct training by making an annual check ride with each RINC. The following considerations should be made whether actually running the itinerary or reviewing the itinerary data card.

GEOGRAPHIC COMPOSITION.– You should look at the total geographic area of the recruiter's assignment. Does the itinerary cover a significant portion of that territory? Have considerations been made for difficulty in travel? Do weather conditions have an impact on the itinerary? Is the itinerary rural, metropolitan, or a combination? You want to ensure the itinerary is viable in relation to time and distance.

TIME.– The recruiter should not be spending more than half of the entire itinerary time behind the wheel of a car. Windshield time should be kept to a minimum to maximize the time spent at each stopping point, where the actual recruiting evolutions are accomplished. Look closely at the driving time and stopping time for each destination. Another time factor to consider is the total time required to conduct the itinerary. Some of the most productive itineraries are all-day trips. The recruiter spends the entire day out in the territory being covered. This provides enough time to adequately canvass the area as well as conduct some interviews on the road.

FLEXIBILITY.– Arrival and departure times on an itinerary are sacred and should not change except for the

most pressing of reasons. How then do we allow time for developing new centers of influence (COIs), personally developed contacts (PDCs), and the evaluation of potential target market centers? Flexibility must be built into the itinerary. Some stopping points or target market centers may be listed as areas instead of specific establishments. This provides the recruiter with built-in time to hold interviews, prospect, or get to know the area better. The use of this flexible time should be planned in advance of each itinerary.

MILITARY AVAILABLE.– Check data from the STEAM reports to determine percentages of the target market covered by the itinerary. Time spent in an area should be in direct proportion to the percentage of military available located in that area. An area that contains a small portion of the market may be covered on an itinerary, but run less frequently than an area with a greater percent of the market. Review all service accession data to see how productive the area has been for all services and how the Navy compares. All segments of a recruiter's territory do not necessarily need to be covered on an itinerary. There are areas that are best covered by phone prospecting, school visits, or LEADS center support.

TARGET MARKET CENTERS.– The next step is to take a look at the actual stopping points on the itinerary. Ask yourself if the stops are logically a source of prospecting activity or leads generation. Activity centers are locations where the recruiter can generate new prospects, such as schools, arcades, and fast food restaurants. Lead generation centers are locations where the recruiter can generate leads, such as media establishments and locations where literature and take-one racks can be placed. Each location should be evaluated for its probability of success, suitability, and best time for visiting. Some target market centers have specific times of the day when a visit can be productive. For instance, a stop at the local burger joint at 0900 would doubtfully produce a PDCing opportunity. The same establishment may be thriving with opportunity during the lunch hour or after school. Encourage recruiters to select target market centers that reflect their personal interests. If the recruiter is an avid fisherman, bait and tackle shops and sporting goods stores may be excellent target market center choices. This gives the recruiter a sense of familiarity and makes initial conversation more comfortable.

Evaluating Existing Itineraries

Evaluating existing itineraries starts the same as for a new itinerary but now we have actual results to evaluate and additional questions to consider.

MATCH ITINERARY WITH THE OVERLAY.– Go to the SMART board and mentally draw out the itinerary route. Do yellow accession dots frequently crop up on the route? In a rural area this is an especially good indicator of itinerary success. Some target market centers will draw prospects from other areas and may be difficult to identify with the efforts of an itinerary. This step should still be done to get a mental picture of the itinerary route in relationship to the rest of the territory.

DISCUSS EACH POINT OF CONTACT.– Ask the recruiter about each point of contact. How many referrals have been provided? Have those referrals resulted in new contracts? Check the referral recognition request file to see if the contact has been recognized. What has the recruiter done to encourage referrals? If the referrals are coming in, great, the stopping point is effective. If not, first help the recruiter develop new tactics for requesting referrals. Then, if that is not effective, recommend deleting that stopping point or finding a new point of contact. If the stopping point is a lead-generating activity, discuss what activity has taken place. Has the media center run hometown news releases or public service advertising? If a take-one rack has been placed, what sort of turnover of materials is happening? Have leads been identified as originating from the literature placed there? You are primarily trying to determine if the stopping point is worthwhile or should be replaced.

PERSONALLY DEVELOPED CONTACTS AND REFERRALS.– You should check the last few months of applicant logs to see if PDC and referral interviews are being generated in the area of the itinerary. If not, you should determine if the recruiter is beginning the itinerary with a goal in mind or approaching the task in a hit-or-miss fashion. The RINC should help the recruiter set goals before each itinerary is run. If goals are set, but not met, training should be accomplished as soon as possible. The RINC should accompany the recruiter on the itinerary (this does not have to wait for the scheduled run date; itineraries may be run any time in addition to the scheduled days of travel) to provide actual show-and-tell training. Try pairing the recruiter up with another recruiter on an itinerary. Not only do they learn from each other, there is confidence in numbers.

POTENTIAL TARGET MARKET CENTERS.– The recruiter should be identifying potential target market centers on the back of the itinerary data card. These should be evaluated as time allows to determine whether or not they should be added to the actual itinerary. The potential target market centers should not remain on the card indefinitely. They either prove effective and are added to the front of the card or are deemed unproductive and lined out indicating no further evaluation is required. Every recruiter should be identifying potential target market centers as a means to continued improvement and keeping pace with social change.

Itinerary Check Rides

You can evaluate certain elements of an itinerary in the office. A thorough evaluation can only be accomplished by running the itinerary with the recruiter and observing his or her interaction with the community. As mentioned earlier, the RINC will run the itinerary with the recruiter as part of the regular review for new itineraries. The RINC will also run existing itineraries with new recruiters before they decide to keep them or develop their own. ZSs should conduct annual check rides with all RINC's. The check ride can tell you a lot about how the itinerary is being run. The following paragraphs will cover some important considerations to make during check rides.

ITINERARY PREPARATION.– Before departing the NRS, discuss the recruiter's preparation activities.

Preprospecting.– Was this itinerary preprospected? The RINC should have loaded the working tickler with prospect cards from the area a few days before the actual day of travel.

Additional Contacts.– Additionally, the working tickler may be loaded with cards without phone numbers, DEP cards, or other cards that should be contacted. Taking the time to consider these contacts on an itinerary can save the recruiter a lot of road time and make the itinerary that much more effective.

Goals Set.– The RINC and recruiter should also have set specific goals for the itinerary. How many referrals and PDCs does the recruiter plan to obtain? What new COIs will be contacted? How will flexible time during the itinerary be used? Setting goals for the itinerary is the most important preparation step. Goals refine the itinerary plan and give the recruiter a measure of success.

Materials to Take on an Itinerary.— Have all materials that may be needed been anticipated and obtained? Materials to consider taking on an itinerary include the following:

- Collateral material (take-ones, pamphlets, giveaways)
- Enlistment screening test (EST) material
- Blank prospect cards
- Prospect cards on prospects to be interviewed
- Blank kits
- School folders, ASVAB results, school lists
- Local map of the area (if the map on the back of the itinerary data card is hand drawn or incomplete)
- Press releases for local or school newspapers
- Films or other material requested for schools or other target market centers
- Public service announcement (PSA) spots
- Advertising items such as posters and window cards

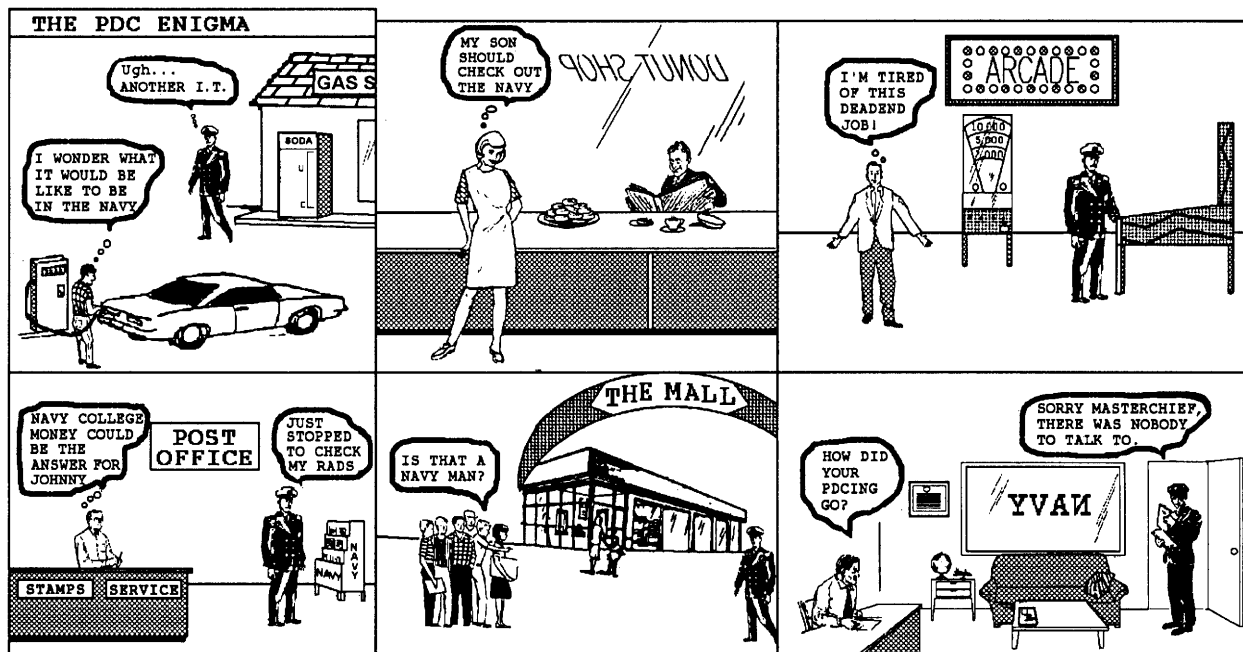
- Applicant processing forms that could be required from the area to be visited such as police checks or birth verifications
- The itinerary data card itself

IS THE RECRUITER KNOWN IN THE AREA?— When the same recruiter appears in the area week after week, he or she generally becomes well known. Observe how the recruiter is greeted at stopping points. Does it seem that a genuine rapport has been established? Does the recruiter know appropriate background information on points of contact? Is it evident that there is more than a passing interest both on the part of the recruiter and the point of contact?

REFERRALS.— Notice how the recruiter approaches the subject of referrals. Does the recruiter draw a picture of the type of individual the Navy is looking for or just ask for names? Ideas to help the recruiter increase referrals can be found in chapter 6.

PDC ACTIVITY.— Does the recruiter take advantage of PDC opportunities or seem to walk right by the potential prospects? Check for PDC training methods in chapter 6.

TIMING.— Compare the timing on the itinerary data card to the time actually spent. Are arrivals and departures on schedule? Do times seem to be realistic?



PDC opportunities.

In other words, do you seem rushed at some stopping points and needlessly loitering at others? Are the times effective? If planned activity cannot be accomplished due to lack of prospects or COIs, ask proprietors what times are more apt to produce the crowds you are looking for.

SCHOOL FOLDERS

The School Folder, NAVCRUIT Form 1133/37, provides a planned approach to prospecting in educational facilities. The school folders list minimum activities that should be conducted through the school year and should be maintained on all high schools, vocational/technical schools, trade schools, and junior colleges in the area. The recruiter uses the school folder as a plan for the high school canvassing program, a log of activity accomplished, and an organizer for the information gathered on each educational facility. The RINC will approve the plan each month by initialing the school folder and may line out activities that do not apply to the school. The ZS will review the folders during each station visit and initial the folders when the month's school plan has been completed or rescheduled. Let's look at some of the things you will want to consider during these reviews.

School Year Goal

Each high school should be goaled for the school year. The NRD should goal each zone for will-grads. ZSs, in turn, will compute a will-grad goal for each of their stations. Each RINC will take this goal and distribute it among the NRS's assigned high schools. These goals are computed on a fair-share basis. Determine what percentage of will-grads is located in each zone, station, or high school and multiply that percentage times the district, zone, or station will-grad goal respectively. ZSs and RINC's may make subjective adjustments to account for past recruiting trends, quality, or other factors that may affect the recruiting efforts in assigned schools.

School New Contract Production

During each review you should check the progress of the school year goal attainment. Compare the current year production to that of the past 3 years on page 3 of the school folder. Note improvements and ask what the recruiter has done to increase the production. Do not forget to compliment the improvement. If production seems to be declining, further evaluation of the school canvassing program is needed to develop a plan for

improvement. Let the recruiter develop the plan but be ready to advise and recommend changes if necessary.

Faculty Blueprinting Information

When reviewing school folders, look to see if there is sufficient blueprinting information listed for educators and staff. If only names are filled in, take some time to see if the recruiter knows more about the faculty than is listed in the folder. If this is the case, have the recruiter provide further documentation in the folder. If the recruiter cannot provide additional details, chances are he or she has an inadequate school canvassing program. Training should be conducted and the RINC may want to accompany the recruiter on the next school visit. The idea behind blueprinting faculty is to continuously add to the recruiter's COIs and make each faculty member a "friend of the Navy." This information should be documented to give the next recruiter a history of information. It also gives a good overview of the recruiter's efforts in the school, so supervisors can better advise on additional coverage.

Recruiter Activities

Review the activities planned and completed during the month. Ask pertinent questions and look for notes explaining the status and/or success of activities that are listed. Be alert to frequent rescheduling of activities. Ask whether these reschedules could have been avoided with better planning and attention. The school visits themselves should only be rescheduled at the school's request or extreme emergency. Although the RINC is authorized to line out activities that do not apply to the school, make sure this is not being done just as a matter of convenience. Check to see if additional activities have been added by the recruiter or RINC. Each school will have special needs and activities that should be added to the school folder. Additional comments and notes sections can be used by anyone planning or reviewing the school folder. This section can be used for additional activities, suggestions for improvement, or acknowledgement of successes.

Additional School Folder Information

The school folder should be a complete canvassing encyclopedia for the school. The more documentation you provide in the folder, the better history you are leaving for the next recruiter. Make the folder work for you. Any information, reminders, or status that you find useful can be included.

SCHOOL POLICIES.– School policies should be entered on page 9 of the school folder. Some policy guidance should be included for the following activities:

- School visit frequency and advance notice
- Interview location and notice or permission
- Students missing classes for interviews, testing, or processing
- Setting up displays, take-ones, and pop stands
- Class talks
- ASVABs
- School lists
- Obtaining transcripts, references, and letters of past issuance

MISCELLANEOUS INFORMATION.– Other information you may want to add to the school folder includes a school calendar of events, letters of appreciation, notes on cooperation, career day information, special giveaways provided, and any special assistance given for sporting events, chaperoning, tutoring, stay in school talks, or math and science presentations.

DEP STATUS BOARD

The DEP status board provides a 12-month rolling picture of the DEP pool. You should check its location in the recruiting station to make sure it is prominently displayed in view of prospects and DEP personnel. The DEP status board includes the school year will-grad target for the station, school year attainment, DEP accessions for the current month, and the total number of DEP personnel. The board lists each DEP member in the month he or she will be shipping along with the high school, ship date, recruit training command, program, recruiter, and number of referral accessions. The RINC is responsible for DEP status board maintenance but may delegate the duty of making the entries. You may prefer to have each recruiter make his or her own entries as the new DEP member returns from contracting. This allows for a ceremonious addition to the official list of DEP personnel. The ZS should periodically review the board for accuracy. Pay special attention to the referral accessions columns on the board. It is a quick look at the DEP referral success of the

station. Occasionally, cross-check these entries with the Recruiting Referral Recognition Requests, NAVCRUIT Forms 5305/1, DEP prospect cards, and applicant logs.

PROSPECT CARD SYSTEM

Often thought of as an administrative system, the prospect card system is actually one of your marketing tools. The STEAM data gives you the market potential. SMART provides tools for identifying where the quality market can be found. The prospect card system identifies individual market segments by name and provides information needed for contact. The objective of the prospect card system is to maintain a working system for prospecting and follow-up over a period of time. In this portion of the chapter we briefly review use of the prospect card and the market segment files. Then we cover the working tickler and maintenance requirements of the system.

USE OF THE PROSPECT CARD

The Prospect Card, NAVCRUIT Form 1130/6, is used to identify the market individually and document blueprinting and contact information to assist in prospecting, determine eligibility, tailor sales presentations, and expedite processing. The more we know about a prospect, the easier it is to pick up the phone to initiate contact or follow-up. Documentation requirements are discussed in detail in the *Science and Art of Navy Recruiting Manual*, NAVCRUITCOMINST 1133.6, and are highlighted again in the discussion in chapter 8 of the DPR. Figures 5-10A and 10B provide basic documentation information.

MARKET SEGMENT FILES

Cards that are not actively being worked are filed in the appropriate market segment file. These market segment files represent your market identification.

School File

Cards in the school file are arranged alphabetically by school and by year of graduation. You should at least identify the current year's will-grads and if lists are available, go ahead and make cards for the juniors. Making cards out for grades below the junior year of high school is not recommended due to the probability of change. Just keep those lists on file and update with new information when the time comes. The school file is one of your best sources of qualified prospects.

RECORD ALL INFORMATION PERTINENT TO PROSPECT

| PROSPECT CARD | | | | | | | | | |
|------------------------------|--|------------|--|--|--|-----------------|--|--|--|
| NAME | | LEAD # | | MARITAL STATUS | | # OF DEPENDENTS | | RECORD TYPE OF ASVAB, AFQT RECEIVED, AND DATE TESTED. | |
| ADDRESS | | CITY | | NAME OF SPOUSE | | | | | |
| PHONE (HOME) | | (BUS SCHL) | | GED | | STATE | | | |
| BIRTH DATE | | SSN | | VOL SCH | | FIELD | | | |
| PLACE OF BIRTH | | RACE | | EMPLOYER | | PHONE | | | |
| YRS OF SCHOOL COMPLETED | | | | PRIOR SERV NEC MOS | | DRILLING (Y) | | (N) | |
| HIGH SCHOOL | | GRAD YR | | RESERVE COMPONENT | | LOCATION | | | |
| COLLEGE | | GRAD YR | | UNIT | | PAY GRADE | | | |
| OCCUPATION | | COL MAJ | | GPA | | | | | |
| MISC | | | | EST | | SERV # | | AFQT | |
| DATE DISCH | | RE CODE | | TYPE DISCH | | ASVAB | | AFQT | |
| PRIORITY SERVICE (YES) (NO) | | SERV | | ACDU | | RES | | ENTER PHYSICAL DATE AND PROFILE (A, B OR C). IF ENLISTS, ENTER DEP AND ACTIVE DATE, PROGRAM INFORMATION AND RTC TO WHICH ASSIGNED. | |
| RATE | | PAY GRADE | | LENGTH SERVICE | | NFQT | | PHYS DATE | |
| DATE DISCH | | RE CODE | | TYPE DISCH | | PROGRAM | | ACTIVE DATE | |
| INTERESTED IN | | | | NAME | | PHONE | | EDUC | |
| FOLLOWING LITERATURE SENT ON | | | | REFERRALS | | EDUC | | ENL DATE | |
| | | | | HGT: | | LEAD SOURCE | | WET: | |
| | | | | ONLY CONTRACTED REFERRALS ARE DOCUMENTED IN THIS SPACE | | | | | |
| | | | | BEFORE COMPLETING THIS FORM PLEASE READ THE PRIVACY ACT STATEMENT ON THE BACK. | | | | | |
| | | | | RECRUITING PROSPECT FORM | | | | | |
| | | | | NAVCRUIT 11306C (12-90) | | | | | |

INDICATE SOURCE OF LEAD

RECORD EST GIVEN, SERIAL NUMBER, SCORE AND DATE ADMINISTERED. PROSPECTS WHO HAVE PREVIOUSLY TAKEN AND PASSED THE ASVAB NEED NOT BE TESTED.

MO-MAIL, OUT
PD- PDC
PH- PHONE
PN- PRO NAVY REFERRAL
RA- APPLICANT REFERRAL
RC- SCHOOL COUNSELOR REFERRAL
RD- DEP REFERRAL
RI- COI REFERRAL
RN- NATIONAL (NOIC, MALTS, NNRIC)
RP- RAP/HARP/SEMINAR REFERRAL
RS- OTHER RECRUITER REFERRAL

RL-LOCAL (TMA) LEAD
WL-WALK-IN

Figure 5-10A. — Prospect card documentation requirements (front).

RECORD OF SALES ACTIVITY:
DBM/HISTORY OF CONTACTS/BLUEPRINTING INFO:

DATE INFO

WANT: _____

NEED: _____

DBM: _____

1. WHAT TOOK PLACE. IF NOT INTERESTED, WHY?

2. STATE FUTURE PLANS, INTERESTS.

3. IF APPLICABLE, RECOMMEND DATE FOR RECONTACT.

4. FIND OUT BEST TIME TO CALL.

INDICATE DATE OF DEP CONTACT IN APPLICABLE COLUMN.

DRUGS:

H - HALLUCINOGENS
P - PSYCHEDELIC
S - STIMULANTS
D - DEPRESSANTS
MJ - MARIJUANA

RECORD OF SALES ACTIVITY:
DBM/HISTORY OF CONTACTS/BLUEPRINTING INFO:

DATE INFO

WANT: _____

NEED: _____

DBM: _____

1. WHAT TOOK PLACE. IF NOT INTERESTED, WHY?

2. STATE FUTURE PLANS, INTERESTS.

3. IF APPLICABLE, RECOMMEND DATE FOR RECONTACT.

4. FIND OUT BEST TIME TO CALL.

DEP CONTACT RECORD (INDICATE DATE OF CONTACT IN BLOCK)

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| J | F | M | A | M | J | J | A | S | O | N | D |
|---|---|---|---|---|---|---|---|---|---|---|---|

PHONE _____

IN PERSON _____

MAIN OBJECTION: _____

POLICE (J,P,C,T): _____

DRUGS (H,P,S,D,MJ): _____

MEDICAL (A,A,I,I,M): _____

AUTHORITY TO BUY: _____

DEP AWARDS/DATE: _____

NAVCRUIT 1130/6C (12/90)

POLICE:

J - JUVENILE
P - POLICE
C - CIVIL
T - TRAFFIC

MEDICAL:

A - ALLERGIES
A - ASTHMA
I - INJURIES
I - ILLNESS
M - MEDICATIONS

ENSURE PROSPECT READS
PRIVACY ACT STATEMENT
PRIOR TO PROVIDING
REQUIRED INFORMATION

Figure 5-10B. — Prospect card documentation requirements (back).

Work Force File

The work force file contains the cards for individuals who are eligible to ship directly to recruit training command. They may be high school graduates or nongraduates. Cards are retained in the work force file for 4 years from graduation. Again, this is one of your primary sources of qualified prospects. Cards should be arranged alphabetically and broken down by male and female. In addition, cards may be arranged by ZIP Code, school, or graduation year.

College File

The college file is arranged alphabetically by first and second year of college and may be further arranged by ZIP Code or school. This file includes 2- and 4-year college students. Once they have entered their third year of college, they are turned over to officer programs for prospecting. The RINC should pull cards from this segment during school breaks and holiday periods to maintain contact and update status.

Inactive File

The inactive file is arranged alphabetically and by year. They may also be arranged by ZIP Code. This file contains the cards of disqualified and rejected applicants (male and female) and prior service individuals. This file is purged monthly following retention requirements listed in the following paragraphs.

DISQUALIFIED, REJECTED AND NO FURTHER ACTION CARDS.— During the DPR the RINC determines the specific reason for disqualification, rejection, or no further action and notes the reason on the back of the card. A diagonal red line is drawn across the front of the card to signify a disqualified, rejected, or no further action applicant. Cards are retained in the inactive file for a period of 2 years from the date of disqualification, rejection, or no further action determination. At the end of the 2 year period the RINC should determine if the disqualification is still a factor and either load it into the working tickler or discard it, as appropriate.

PRIOR SERVICE CARDS.— The inactive file also contains prior service cards. Prospect cards on DEP personnel are placed in this file the day the individual graduates from recruit training command (RTC). It may be necessary to retrieve the card for documentation of conversations with parents, referral activity, hometown area recruiting program (HARP) participation, and the

like. The prior service card is maintained in the inactive file for a period of 2 years from the RTC graduation date. When prior service cards are received at the NRS from outside lead sources, such as Personnel Accounting Machine Installation-Continental United States (PAMI-CONUS) and national advertising lead tracking system (NALTS), the RINC determines if the applicant appears to be eligible and within current goal restraints. If eligible, the card is placed in the working tickler for prospecting. If the applicant appears to be ineligible or cannot be located, the card should be retained in the inactive file for a period of 2 years from date of receipt.

WORKING TICKLER

The working tickler is arranged for the 12 months of the year with the first month further divided by 31 days. This tickler contains prospect cards to be “worked,” itinerary data cards, QNE cards, DEP cards, recurring reports ticklers, lead tracking, and no-phone cards to be identified. The working tickler is the tool used by the RINC to ensure the recruiters have the resources to complete their planned prospecting and meet the station’s goals.

Loading the Working Tickler for Prospecting

On the last working day of each week, the RINC will load the working ticklers for each recruiter for the following weeks prospecting. At no time should the RINC load the working tickler for more than 1 working week. The RINC monitors the working ticklers daily to make sure there are enough cards to achieve goal. Cards that require future follow-up should be placed in the applicable day or out-month section of the working tickler. The cards will normally remain in the working tickler until a contract is signed, the applicant is disqualified or rejected, or the RINC determines during the DPR that no further action is currently required. The card is then properly documented and refiled in the appropriate market segment file.

CONSIDER GOALS.— The first consideration when loading the working tickler should be the station goals. What individuals are we looking for? Work force, will-grads, minorities, upper mental group percentages, special program, and prior service goals should all be considered. Cards must be loaded in sufficient proportion to achieve assigned goals. Keep in mind that markets do not produce the same prospecting ratios. For example, more work force cards than will-grad cards are usually required to net the same number of interviews.

CHECK STEAM DATA AND SMART SYSTEM.– Your next step is to go to your marketing data to find out where you are most likely to find the individuals to meet the assigned goals. All areas should still be covered, but special emphasis should be placed on the areas that are identified as likely to yield the quality contracts you are looking for.

CHECK STATION PLANNER.– Check the station planner to determine prospecting requirements for the coming week. How much phone prospecting is planned? What preprospecting requirements must the recruiters meet for itineraries, school visits, and so on? Working ticklers should not be arbitrarily level loaded. The number of prospect cards should coincide with the recruiter's plan for the day.

CONSIDER INDIVIDUAL RECRUITER AND TERRITORY.– Individual allowances also should be made for each recruiter and territory. What cards are available to prospect from? How many can each recruiter effectively make a disposition on within the time planned? What are the recruiter's success ratios? Although we do not keep "numbers" on the recruiters, you should know how many interviews each recruiter needs to net a contract, how many appointments are needed to produce an interview, and how many contacts are needed to set an appointment. Have the recruiter keep track for a couple of months to establish these ratios. This will give you a good idea of how many prospect cards to load as well as training needs.

CONSIDER WHAT IS ALREADY IN THE WORKING TICKLER.– The working tickler may already contain cards that need follow-up from previous prospecting. The recruiter may also have leads and referrals to continue prospecting. You do not want to overload the working tickler with new prospecting if the recruiter has a good follow-up base.

GO TO THE MARKET SEGMENT FILES. – Now you are ready to go to the market segment files and pull cards to support your station's goals. Do not always go to the front of each segment to start pulling your cards. You may want to make use of a "stop" card to mark where you have pulled to within each segment. Whatever method you use, just make sure you are getting a good rotation on all the cards in the market segment. Selectively pull the quantity and quality of cards that you have determined will meet station goal. There is no magic number.

DETERMINING HOW MANY CARDS TO LOAD.– That's right, there is no magic number. Each RINC will develop his or her own method to determine the number of cards each recruiter will need. Some use the five-card method, believing five good dispositions per day will suffice for every recruiter. Some use exact ratios for each recruiter. Others may use a bank system. The important thing to remember is that you should never give a recruiter more cards than can be effectively worked each day. When cards start to snowball and recruiters see their daily phone prospecting pile grow and grow, their enthusiasm proportionately wanes.

An old story about duck hunters correlates well with the idea of selectively loading only as many cards as can effectively be worked. One duck hunter used a shotgun, but could not stand to keep his eyes open when he shot. He just knew if he closed his eyes with the shotgun pointing in the general direction of a flock of migrating ducks, all that buckshot was bound to hit something. Well, he did occasionally hit something, but not the ducks he was hoping for. The other hunter took careful aim at one duck in particular. He would miss sometimes but just aim again at the same duck. He usually enjoyed roast duck for dinner. Phone prospecting is very similar. Have your recruiters take careful aim and be persistent in contacting the prospects the Navy needs.

CARD BANK CONCEPT.– Pulling prospect cards to load the working ticklers can be a time-consuming task. Level loading cards can cause a buildup that overwhelms the recruiter. One method of preventing this is the card bank system.

CAUTION: Check with your chain of command before using the card bank system.

This system allows the RINC to pull cards at the end of a week for the entire following weeks prospecting. The first day of the working tickler is loaded with sufficient cards to complete that day's planned prospecting. The rest of the cards are filed at the end of the week to provide a "bank." At the production review, all cards that have been dispo'd (appointment set, disqualified, or otherwise determined to require no further action) are replaced from the bank. This ensures cards do not build up to an unmanageable level in the recruiter's working tickler. RINC's using this method must exercise great care to make sure their banks do not contain any more than 1 working weeks worth of prospecting.

Other Cards to Load in the Working Tickler

The working tickler is designed to contain cards for all recruiting activity. It becomes the day's work plan. Not only do the additional cards serve as reminders, they are also easily located within the system.

FOLLOW-UP CARDS.— One of the best ways to determine if your RINC's are running effective working ticklers is to check for cards loaded in out-days and months for follow-up. You should find cards programmed for contact that have previously been identified as awaiting scholarships, trying new jobs, needing retests, having temporary medical problems, and so on.

ITINERARY DATA CARDS.— Itinerary data cards should be filed in the working tickler behind the day they are next scheduled to be run. The only time they are not in the working tickler is when they are accompanying a recruiter on the itinerary or being evaluated.

QNE CARDS.— Prospect cards for individuals who have qualified but not enlisted (QNE'd) are maintained in the working tickler for 6 months to ensure the required monthly contacts are made.

DEP CARDS.— Prospect cards for personnel in the DEP are maintained in the working tickler. They should be filed behind the day they are planned to be contacted. All DEP cards should not be filed together. There should be a plan of phone and face-to-face contact that will determine DEP card placement in the working tickler.

RECURRING REPORTS.— A 5 by 8 card should be filed for each recurring report that is required from the station. There is no required format for the report tickler cards used in the working tickler; however, the Navy does have a Recurring Reports Record, NAVSO 521 3/7, shown in figure 5-11. You can use this card, adapt it to your needs, or use any 5 by 8 index card to create your own. Recurring reports that you should maintain tickler cards for include the following:

- Vehicle reports
- Annual equipment inventory
- Transportation request/bulk ticket/meal ticket logs
- Out-of-pocket expense claims

| | | | |
|---|----------|------------------------|-----------------|
| 1. REPORT SYMBOL | 2. TITLE | 3. FORM NUMBER | 4. TICKLER DATE |
| 5. PERIOD COVERED OR AS OF DATE | | 6. MAILING DATE | |
| 7. OFFICE PREPARING REPORT | | | |
| 8. PERSON TO CONTACT | | 9. TELEPHONE EXTENSION | |
| 10. DISTRIBUTION (<i>Original, copies, via, etc.</i>) | | | |
| 11. DIRECTIVES (<i>Bureau and Local</i>) | | | |
| 12. SPECIAL COMMENTS | | | |
| RECURRING REPORTS RECORD | | | |

49NVM030

Figure 5-11.—Recurring Reports Record, NAVSO 5213/7.

- DEP reports
- Combination lock change

LEAD TRACKING. – Local and national lead cards should be maintained in the recruiter's working tickler for 4 months, until contracted or the lead becomes unworkable, whichever comes first. The lead feedback card should be filed in the RINC's working tickler behind the same day that the lead card itself is filed in the recruiter's working tickler. The RINC will roll the feedback card daily, in tandem with the lead card.

NO-PHONE CARDS.– Prospect cards without phone numbers should periodically be loaded into the recruiters' working ticklers for further identification. The RINC may have the recruiter take a few along on an itinerary to attempt a face-to-face contact, leave a door-knocker, or send a personal mail-out. DEP personnel are often successful in providing further information on these no-phone cards. Therefore, the RINC may want to load a couple in conjunction with DEP contacts.

MAINTENANCE OF THE SYSTEM

Maintenance of the prospect card system is the responsibility of the RINC. Maintenance is a daily evolution that involves proper documentation, filing, purging, and initial market identification. We have covered documentation and filing requirements. Now let's take a look at purging the system and adding to it through market identification.

Purging the Prospect Card System

The prospect card system is purged daily during the production review. Cards are returned to the working tickler, filed in their appropriate market segment file, or filed in the inactive file based on the RINC's opinion of further prospecting needs. Individual market segment purges should be accomplished annually, with the exception of the in-service file that is purged monthly. During these purges, you should follow retention requirements mentioned earlier.

Market Identification

Market identification is a vital part of the marketing process. For without names and a method to contact these individuals, all our marketing numbers cannot be very useful. One of the first things you will check in a new station is the percent of market identification. A

quick estimate of the number of prospect cards in a system can be made by measuring with a ruler. Use the gauge of 100 cards per inch to determine a ballpark figure of the number of cards you have in each market segment file. Make a quick check of cards to make sure there is not an abundance of duplicates or stapled continuation cards that will artificially increase your count. Bounce school file totals with the population figures in the school folder and Station Level Market Share report. Multiply the number of high school seniors times 4 to determine the number of work force cards you should have.

NOTE: If your station retains the cards longer than 4 years, use the appropriate multiplier. College population and prior service numbers can be taken from the Station Level Market Share report. The in-service file identification can be compared to past years' production figures.

It is virtually impossible to identify every military available individual within your territory. You should strive for a minimum of 75 percent market identification. This should give you a good base to load working ticklers for prospecting.

If you find your station's market identification below 75 percent, you should institute a plan of action to correct this deficiency at once. Each recruiter should be responsible for adding to his or her territory's market identification. Overall responsibility still rests with the RINC. The following ideas may assist your market identification efforts:

- Your lead tracking center (LTC) can provide lists by ZIP Code.
- School lists and college drop lists are excellent sources.
- Libraries often have old yearbooks with the names of graduating classes to get you started.
- Phone books and cross-reference directories can help provide contact information.
- DEPPERS are still some of your best resources for market identification.
- Companies that print yearbooks, take class pictures, and provide class rings usually have names of current and past graduates. Many will provide the information. If they require a fee,

contact your LTC for information on name list purchases.

MARKETING OPERATION PLAN

Each NRD, with its Area's guidance, develops and implements annual operations plans according to the *Marketing Operations Plan*, COMNAVCRUITCOM-INST 3121.2. The Area marketing officer coordinates the development of the plans. Each district also establishes a marketing council or quality management board (QMB) consisting of key advisors and decision makers. Your input from the station and zone level is a crucial element in the development of the district marketing operations plan.

PURPOSE AND BENEFITS

The marketing operations plan is designed to identify where we are as a district now and where we are going. It is a usable planning document that reviews the past year's production and identifies strong points and problem areas. The operations plan is designed to accomplish the following:

- Stimulates thinking to make better use of available resources
- Reduces crisis management
- Assigns responsibilities and schedules work
- Improves communications within the command
- Coordinates and unifies efforts
- Facilitates control, monitoring, and evaluation of results
- Provides source marketing information for current and future reference
- Facilitates progressive advancement toward a goal

CONSTRUCTION

An operations plan has five basic requirements: it must be (1) simple and easy to understand, (2) clear, precise, and detailed to avoid confusion, (3) practical and realistic, (4) flexible, adaptable to change, and (5) complete (cover all significant marketing factors and assign responsibilities). The operations plan includes the

enlisted programs plan, the officer programs plan, and an executive summary.

Enlisted Programs Plan

The enlisted programs plan includes a situation analysis, an evaluation of resource allocation and goal apportionment, and plans of action and milestones (POA&Ms). The EPO will use information from the zone situational analyses and past marketing data to formulate the enlisted programs plan.

SITUATION ANALYSIS.– The situation analysis section of the plan will include data on resource projections and implications regarding production recruiters and operating assets, marketing assumptions and implications, past production and activity analysis, and a final section on strengths and weaknesses. This section is not meant to identify crutches, but rather point out possible hurdles with plans to overcome them.

RESOURCE ALLOCATION AND GOAL APPORTIONMENT. – In this section, districts list how they are going to weight market share and recruiter share and the rationale behind the decision. This section is also used to address any subjective considerations used in goaling or RAF manning deviations.

PLAN OF ACTION AND MILESTONES. – This is the real heart of the operations plan. All the other steps lead to this point. The POA&Ms are the operations plan in effect. All the analysis sets us up to write down how we are going to logically, methodically, and chronologically accomplish our goals for the coming year. Required enlisted program categories include nonprior service (NPS), nuclear field (NF), minority, DEP, and prior service (R/Z). POA&Ms must be written for these five major programs, at a minimum. The district has the discretion of adding more, if desired.

Elements of the POA&M.– Although POA&Ms are unique to the district and program being addressed, they share the same basic elements such as the following:

- **Objective.** Every district's generic objectives are the same – to improve over last year and meet or exceed all qualitative and quantitative enlisted and officer program requirements. This is understood and does not need to be restated on each POA&M. Specific or secondary objectives should differ somewhat between districts. An example of a district's specific objectives might be to increase DEP referrals by 50 percent over last year.

● **Action items.** These are the steps planned to reach the objective. An example of an action item might be to develop specific actions and tracking system to provide for obtaining 20 percent of new contracts from DEP referrals.

● **Action officers.** This column lists the persons accountable for making sure the action step is accomplished on time.

● **Due date.** This column is used to establish start/stop/due dates when the action is to be accomplished. For most actions there will be only a single date; if it is ongoing, monthly, or quarterly, these requirements should be listed.

● **Monthly columns.** These columns are used to graphically display when the action step is to be accomplished. They can also be used as a progress chart. As actions are completed, the chart can be annotated as desired.

● **Out-of-limits condition.** At the bottom of each POA&M, there should be an explanation as to what

constitutes an out-of-limits condition, with respect to satisfactory progress, along with resulting action required. This may be simply a maximum time-late for the action step with the accountable officer required to report reasons and corrective action to the CO. Figure 5-12 shows a POA&M with all the required elements.

Use of the POA&Ms.— All key participants should be involved in the plan's development process. The EPO together with the CR takes the lead in formulating enlisted inputs to the command operations plan. Through the CR, the EPO maintains communication with field elements to stimulate and ensure the two-way flow of accurate market information. All levels of the production chain should fully understand the POA&Ms as well as their responsibilities to contribute to them. The EPO updates the executive officer (XO) and QMB monthly as to the status of completed milestones. ZSs and RINC's should give a monthly status on any POA&Ms under their cognizance to be included in the EPO's update. Remember, this is the working portion of the operations plan. Implementation and follow-up of the POA&Ms should ensure objectives are met.

| PLAN OF ACTION AND MILESTONES | | | | | | | | | | | | | | | | | | | |
|---|---------------------------------|----------|---|---|---|---|---|---|---|--|---|---|---|---|---|---|---|---|--|
| OBJECTIVE: To increase market identification in the primary target market. | | | | | | | | | | PROGRAM: EPO NPS GENERAL PAGE 1 OF 20 | | | | | | | | | |
| ACTION ITEMS | ACTION OFFICERS | DUE DATE | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | |
| In coordination with OPO, clearly identify junior/ 2-year college market. | EPO,OPO, EDSPEC, CR,ZSs, RINC's | 1JAN XX | | | | | | | | | | | | | | | | | |
| OUT OF LIMITS CONDITION: EPO will report list of all junior/2-year colleges not clearly identified by 1JANXX to the CO. | | | | | | | | | | | | | | | | | | | |

Figure 5-12.— Plan of action and milestones.

Officer Programs Plan

The officer programs plan covers the same elements as the enlisted plan. The officer programs officer (OPO) takes the lead in formulating officer programs input to the plan. The OPO recommends specific courses of action in regard to prospecting, lead generation, advertising, market analysis, and processing to achieve the officer program objectives.

Executive Summary

This section is written last. It provides a one- or two-page overview summarizing the enlisted and officer sections of the plan that has already been written. The XO normally writes the executive summary with the OPO and EPO as it summarizes both sections of the plan. This narrative serves as an introduction to the situation analysis. The work already done in the situation analysis and completed tables are supporting arguments for statements made in the summary.

ZONE SITUATION ANALYSIS

We have discussed the marketing operations plan that is developed at the district headquarters. Now let's take a look at the zone situation analysis that provides a major part of the district enlisted programs plan input. Keep in mind that although you are providing the information to the district for inclusion in the operations plan, the information and evaluation should be used within your zone for decisions concerning prospecting and recommendations for manning and goaling. Your territory analysis evaluated your market to show what you have to recruit from. Your station situation analysis will go a step further and evaluate resources, past productivity, and activity along with the marketing data. This will give you a more complete picture of where you are now and what directions you should take. Look at what you have and what has been done with it to determine what you should do next.

Resource Projections and Implications

Your resource projections include production recruiters and operating assets. As you address the production recruiter portion of your analysis, consider manning levels, comparing individual station RAFs to actual onboard counts. Take a look at your personnel turnover rate, both projected rotation dates and your average annual loss due to fault/no-fault transfers. Next consider the experience levels of personnel assigned. Check recruiter qualification standard (RQS) levels

required and attained. You should also consider CRF personnel assigned or required. Operating assets should include your zone's funding requirements for temporary additional duty (TAD), applicant travel, equipment and furnishings, and any DEP/COI functions planned. You can take this information from your budget input sheets.

Marketing Assumptions and Implications

Use the information that you have gathered for territory analysis to address economic and demographic assumptions, political and social assumptions, and goals and policy.

ECONOMIC AND DEMOGRAPHIC ASSUMPTIONS.– As you gather information on your territory, look at per capita income figures, unemployment rates, population figures, and the type of area you cover, such as rural or metro. You are looking for differences as well as trends that may affect recruiting. If per capita income is extremely high, a steady income may not be your biggest selling point. If unemployment is steadily decreasing, you may find stiffer competition for the recruitable market. Attitudes tend to differ in rural and metropolitan populations. Once you have identified some basic assumptions, look for ways to either overcome the detriment or capitalize on the benefit.

POLITICAL AND SOCIAL ASSUMPTIONS. – Political and social assumptions are made by gauging the local support for the military, rapport with the educational community, support for high school ASVAB testing, propensity to enlist, and competition from local industry and other services. Again, you are gathering data and making an educated assumption of its impact on recruiting so that you can develop a plan.

GOALS AND POLICY.– The NRD plan will include an annual goal planning matrix. At your level, you should make general statements concerning anticipated policy considerations. Include information on quantity as well as quality. An example would be that NRS A, a station with historically low ASVAB scores, will be goaled with a lower percentage of upper mental group enlistments, which will be offset by NRS B, which has steadily yielded 75 percent upper mental group enlistments. These considerations should all be based on available marketing data.

Past Productivity and Activity

This section of your analysis should include an evaluation of the previous year's ending recap sheet. You should also consider processing results. Your MEPS conversion rate will tell you how many applicants you should be processing to attain assigned goals. (This information was also used on your budget worksheet to determine applicant travel funds.) Evaluate your conversion ratios to determine training needs.

NALTS and LEADS results should be evaluated. What percent of your assigned goal can you plan from NALTS or LEADS? Is your station or zone meeting the district average in lead-to-contract ratios? Use your DOD all service accession data report to determine if you are getting the Navy's fair share of all service contracts. Finally, this section should contain leadership and management initiatives you have used or plan to implement.

